**The Education People**

Job Description: Customer Support Officer

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| **Section:****Location:****Grade:****Responsible to:** | **Schools Financial Services****New Hythe Lane/Hybrid****TEP8****Core Delivery Manager** |

**Purpose of the Job:**

To provide advice, support and guidance to all customers including helpdesk cover. To deliver and assist in the maintenance of information and guidance for Schools Financial Services customers and staff.

To support and administer information systems and software operated by Schools Financial Services and its customers to ensure consistency.

To support the requirements of the marketing strategy.

**Main duties and responsibilities:**

1. Act as the focal point for enquires giving high quality advice and information to all customers acting as the first point of contact (helpdesk) for all incoming enquiries.
2. Maintain and cascade, as appropriate, the information and guidance available to Schools Financial Services customers and staff.
3. Deliver and support a small number of contracts as defined in the relevant contract specification documentation and agreed with schools, academies and MAT’s. This will include providing support and sound financial management advice to schools on budget preparation, monthly monitoring and closure of accounts.
4. Support the operation of all information systems and software for Schools Financial Services ensuring consistency.
5. Be responsible/assist with maintaining and reconciling the records for invoicing customers.
6. Be responsible/assist with the maintenance and reconciliation of the School’s balances on the Local Authority holding accounts.
7. Be responsible/assist with the maintenance and reconciliation of school’s VAT claims, ensuring school’s VAT is claimed appropriately and reimbursed to schools in the given timescales.
8. Be responsible/assist with administering KCC’s capital loan scheme, ensuring that advances and repayments are processed in the given timescales.
9. Assist with the installation of new applications and support and customise existing applications to preserve longevity and ensure SFS continue to meet business needs.
10. Promote Schools Financial Services products to increase income in accordance with the marketing strategy.
11. Support the delivery of all business requirements of Schools Financial Services.

Footnote: This job description is provided to assist the job holder to know what his/her main duties are. It may be amended from time to time without change to the level of responsibility appropriate to the grade of post.

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**Person Specification**

Schools Financial Services

Customer Support Officer TEP8

The following outlines the criteria for this post. Applicants who have a disability and who meet the criteria will be shortlisted.

Applicants should describe in their application how they meet these criteria.

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| **Qualifications** | Financial qualification or ability to do the job |
| **Experience** | Experience of working within a finance environment |
| **Skills and Abilities** | Ability to work on own and as part of a team |
| Good customer relationship skills |
| Good IT skills  |
| Good written and verbal communication skills |
| Good organisational skills |
| Ability to maintain confidentiality |
| Research, analytical and interpretive skills |
| Fluent in English |
| **Knowledge** | A good understanding of national and local policies, financial controls and proceduresKnowledge of school finance systems. |
| **Company Values and Expectations** The Education People and Commercial Services Group are guided by our shared values: * **Give our best** – We are empowered and have the autonomy to give our best every day. We are accountable for what we do. We are comfortable with openness and challenge in the pursuit of improvement.
* **Make a difference** – We do the right thing on a difficult day. We are building on our legacy for success. We are making a difference for tomorrow.
* **Everyone is valued** – We look out for each other. We enjoy doing a good job together. We are inspired to speak, everyone’s voice matters.
* **Freedom to thrive** – Our creative and adaptive thinking allows us to lead the way. We are curious and passionate. We have the freedom to innovate and thrive.
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